

# **TOWN OF HILTON HEAD ISLAND REQUEST FOR PROPOSALS COMMUNITY VISIONING PROCESS RFP 2016-0010**

The Town of Hilton Head Island, South Carolina is soliciting proposals from qualified consultants with a minimum ten years' experience in assisting communities develop a long term community vision. The firm must have a time tested and proven process design methodology specifically developed for achieving community vision objectives and a verifiable performance record of achieving successful results developing visions for other communities similar in size and nature (tourism). The selected firm will provide a fully qualified/experienced staff member to serve as the "Vision Consultant" who will assist in developing a framework for developing a community vision and provide guidance throughout the process. The proposed process design must allow for all tasks to be completed within twelve to fifteen months from the start of this project. To be responsive to this solicitation your proposal must fully address all issues in the scope of services and your proposed staff must meet all the requisite qualifications and hands on experience reflected in this request for proposals (RFP).

Town Council will be appointing a Steering Committee to oversee the execution of this project. It is also anticipated that in addition to hiring a consulting firm the Town will hire a full time, on site Project Coordinator (either a temporary employee or another consultant) to oversee the myriad of day to day activities necessary to effectively execute the process under the direction/guidance of the Steering Committee and in coordination with the Vision Consultant/other members of the team. A strategic communications plan will be developed to support this project and will be provided/overseen by the Town's on call communications firm Rawle Murdy of Charleston S.C. Rawle Murdy will report directly to the Steering Committee but will integrate and coordinate their efforts with both the onsite Project Coordinator and the Vision Consultant. Effective communication and coordination will be key to the success of this project.

One of the key objectives for this project is the active participation by citizens throughout the life and beyond the end date of this project. Therefore we will be soliciting members of the community to serve on a vision team that will help the Steering Committee achieve its goals of community outreach and citizen ownership of the resulting vision from this project.

It is anticipated this project will be a community wide effort that will take between twelve and fifteen months with work by the selected Vision Consultant beginning in summer 2016 and the citizen participation portion commencing in earnest in the early fall of 2016.

## **SUBMISSION REQUIREMENTS:**

All responses should be delivered in sealed envelopes clearly identified as "Vision Planning Services" (RFP 2016-0010) by not later than 2:00 PM on July 21, 2016. Please provide a minimum of 6 hard copy responses and one digital copy on CD. Responses should be hand carried or delivered by traceable means to the following address.

Town of Hilton Head Island  
One Town Center Court

Hilton Head Island SC 29928  
Attn: Shawn Colin, Deputy Director of Community Development  
RFP 2016-0010 Vision Planning Services

Any responses received after this time or date will not be opened and shall not be considered for award.

By issuing this RFP, the Town of Hilton Head Island is not committing itself to award a contract or pay any costs incurred in the preparation of responses. The Town further reserves the right to accept or reject any or all responses received, to waive formalities, to negotiate with any or all qualified firms, and/or to cancel the RFP in part or in its entirety if it is in the best interest of the Town.

Responses to this RFP will be subject to the Freedom of Information Act (FOIA). Further, the names of the responding firms shall be released to the public following the submission date and time.

Any Firm qualifying for the Town's local vendor preference should include a copy of their certification with their proposal for it to be considered.

For information concerning this request for proposals, please contact Shawn Colin at (843) 341-4696 or [shawnc@hiltonheadislandsc.gov](mailto:shawnc@hiltonheadislandsc.gov).

Any questions must be submitted in writing via email to the above point of contact. The Town will accept questions until close of business on July 5, 2016. Should one be required the Town will issue a final addendum for this RFP not later than July 13, 2016.

### **RESPONSE FORMAT**

Responses are to be self-explanatory and designed in a manner to provide the Town with a straightforward presentation of the firm's capabilities and qualifications. Elaborate brochures and other promotional type materials are not desirable. The firm is encouraged to submit, for the Town's review, any additional information pertinent to the project.

#### **1. General Background and Resources;**

- Executive summary of the Firm's history.

#### **2. Direct Project Experience on project similar in scope and size:**

- Provide a list of past or current relevant clients for whom you provided similar services as those reflected in Exhibit 1 (developing a long term community vision for other communities similar in size and nature). Provide a minimum of three (3) but not more than five (5) similar projects completed successfully including location, detailed description of services provided, time frame, and budget (include client references – name and phone number). Personnel assigned to this project should have been involved in all or a majority of the projects referenced as similar. Provide a primary point of contact with valid phone number and email address for each referenced client. Ensure these references are aware of your response to this RFP and that they will provide a timely response when contacted by a representative from the Town's Selection Team.
- Provide a detailed summary description of the vision planning services performed for each client. Firms are encouraged to include samples of work products/materials they feel best represent the quality and relevancy of their vision planning efforts on behalf of those clients.

### **3. Project Team:**

- Provide a detailed resume of the person that is being proposed to be the “Vision Consultant”. List any supporting personnel and their qualifications (to include resume) and experience who may be required to support the Vision Consultant.

### **4. Proposed Project Process Plan and Project Schedule/Fee:**

- Provide “Proposed Project Process Plan and Project Schedule” that addresses in detail the methodology and process design you propose using to achieve the project goals/tasks reflected in the Town’s Scope of Services. The vision planning firm selected for this project will perform all those initial tasks reflected in the scope of services necessary to effectively execute the vision process reflected in their response. Once these initial tasks have been completed the Vision Consultant will then fulfill the role of an on call technical advisor throughout the life of the project, ultimately resulting in the satisfactory completion of all project objectives and deliverables. It is anticipated this will require the Vision Consultant to perform an onsite audit once every six to eight weeks to measure project progress and to assist the onsite Project Coordinator: At the conclusion of each visit the Vision Consultant and Project Coordinator will jointly provide a presentation/written project status report to the Vision Steering Committee at a regularly scheduled public meeting. These public meetings will be broadcast and captured on video for viewing by the public.
- The proposed Project Process Plan should include an hourly breakdown for all tasks and sub tasks reflecting both the level of effort in man hours and the hourly rate and title of the project team member/members assigned to perform each task. The total for this plan should reflect your total fee. Where the work plan reflects the need for onsite visits your proposal should include a not to exceed project budget for travel, lodging, per diem and transportation per visit.

### **5. Other Pertinent Information**

- Present and anticipated workload of project team.
- Reserves: Description of available backup personnel/resources.
- Litigation history of the lead firm for the past 5 years.
- Additional information you feel may be relevant.

## **EVALUATION FACTORS/INTERVIEWS**

All proposals shall be reviewed and evaluated by a selection committee comprised of members of the Vision Steering Committee and Town Staff. Those firms determined susceptible for award based on an evaluation using the selection criteria reflected below, will be interviewed either in person or by phone whichever is deemed most appropriate by the selection committee.

- Quality of proposed staff filling key positions and record of previously completed projects (minimum of 3 not more than 5) of similar scope and size completed within the past 5-10 years. A verifiable record of completing projects on time and on budget. A record of providing services that fully met or exceeded the client’s expectations. The demonstrated experience and qualifications of the proposed individual from your firm who will perform the role and tasks as the Vision Consultant. This person should have performed this role or a role very similar on all or at a minimum the majority of the referenced projects.
- Proposed Project Process Plan that includes a process design that demonstrates a detailed and comprehensive understanding of the project scope of services. The plan/process design includes all the requisite resources and the proposed schedule meets the project required timeline for project completion. The individual proposed to act as the “Vision Consultant” has the requisite

skills and direct experience necessary to successfully complete the project goals/objectives. The Process Plan accurately identifies all major challenges/opportunities and includes innovative/creative proposed solutions (best practices) that have produced verifiable positive results on past projects.

- Total fee for services.
- Those firms attending the onsite interviews will receive a final ranking based on the results of the interview and their proposals.

#### AWARD OF A CONTRACT

After all interviews have been completed, the selection committee will forward their final recommendation for award via the Vision Steering Committee to Town Council to include a final fee.

Award will be made to the most qualified firm after evaluation of all responses, interviews, a thorough review of their qualifications, and completion of negotiations and acceptance of their fee.

The right is reserved to reject any and all responses received; and, in all cases, the Town will be the sole judge as to whether the response has, or has not, satisfactorily met the requirements of this RFP.

#### GOVERNING LAW

The firm must comply with the laws of the State of South Carolina and the ordinances of the Town of Hilton Head Island, South Carolina.

#### AFFIRMATIVE ACTION

The firm shall take affirmative action in complying with all state and federal requirements concerning fair employment, and the treatment of all employees, without regard to, or discrimination by reason of race, color, religion, sex, national origin, or physical handicap.

#### INSURANCE

The firm shall maintain, throughout the performance of its obligations, a policy of Worker's Compensation insurance with such limits as may be required by law. It shall also maintain a policy or policies of general liability insurance insuring against liability for injury and death of persons, and damage and destruction of property. Such general liability insurance shall have limits as required by city, county, state and federal standards.

#### INDEMNIFICATION

The Town, its directors, agents, and employees shall be held harmless from liability from any claims, damages, and actions of any nature arising from the completion of the project, provided that such liability is not attributable to negligence of the part of the Town

**EXHIBIT (1)**  
**RFP 2016-0010 VISION PLANNING SERVICES**  
**SCOPE OF SERVICES**

TASK # 1: Conduct meetings and onsite interviews to gain a complete understanding of project goals and objectives. Working with the Steering Committee and Town staff develop and deliver a detailed version of the proposed project process plan reflected in your response to our RFP. Include recommended strategies/methodologies and resources for successfully completing each element of the project process plan. Clearly define your role, tasks and responsibilities throughout the life of the project to ensure it remains on schedule/on budget and reaches a successful conclusion. Ensure the plan reflects any critical path issues and provides a clear description of deliverables for each phase of the project.

TASK # 2: Working with the Steering Committee and Town Staff develop and deliver a detailed job description for the onsite project coordinator position to include required areas of expertise/education/experience/skills. Assist the Town with the recruitment process for a short term employee for this position.

Task # 3: Once all the elements of the project plan are in place your role will be to monitor the project progress from offsite through weekly conference calls with the Project Coordinator. Every six weeks make an onsite visit to audit progress to date and refine detailed tasks for the upcoming six week period. Working with the Project Coordinator develop and present a status report at a public meeting of the Steering Committee. Ensure any deliverables that were to be completed during this reporting period have been completed to the Town's satisfaction. Make any recommendations regarding adjustments to the process plan or planned activities for the upcoming six weeks.

Task # 4: Working with the Steering Committee, Project Coordinator and Town Staff guide the development of the final "Town of Hilton Head Island Vision", that reflects the values, priorities, and aspirations of the community as identified through the project".

**Primary Deliverables**

1. Town of Hilton Head Island Community Vision.

**Secondary Deliverables**

1. Summary of Stakeholder and Community Interviews
2. Community Surveys
3. Statement of Community Values, Priorities, and Aspirations